

Estate Checklist

1. **Death Certificate:** Check all information you submit for the death certificate.
2. **Social Security:** Notify Social Security. Apply for death benefit for surviving spouse or disabled child.
3. **Pension:** Notify pension administrators.
4. **Life Insurance:** Submit paperwork for collection life insurance proceeds.
5. **Veterans/Railroad Employees Survivor Benefits:** If the decedent was a veteran of the U.S. Armed Services or an employee of the Railroad, there may be survivor's benefits available.
6. **Notify Credit Card Companies:** Notice should be in writing, return receipt requested. Return the destroyed credit card if it was not a joint account. If it was a joint account, the credit card company should still be notified to remove the decedent's name from the account.
7. **Cancel Subscriptions:** Refunds may be available for the remainder of the subscription.
8. **Mailing Address:** If you will be in charge of the estate and the decedent's mailing address is different from your own submit a change of address form to the Post Office. Write DECEASED on the top of the form. You may need to present a death certificate.
9. **Assets:** Compile a list of assets of the decedent. This will include all bank accounts, annuities, investments, personal property, jewelry, real estates, etc. Try to estimate their value...this will be important.
10. **Important Documents:** Locate any important documents, such as life insurance policy, stock certificates, Will and Trust.
11. **Decedent's Accounts:** If the decedent's accounts were not in joint tenancy OR in the Trust, you may need a court order to access them. The bank has the right to freeze a decedent's account at death if it is not joint tenancy or in a Trust. Also, safe deposit boxes not held in the name of the Trust or in joint tenancy maybe frozen.
12. **Durable Powers of Attorney:** These documents, while essential and helpful during life, can not be used once the individual has died. You will not have any authority under them.
13. **File For SS 4:** An estate is a separate entity and with few exceptions will need its own taxpayer identification number with the IRS. An attorney or accountant can help you with this form.
14. **Affidavit on Death of Joint Tenant:** If the decedent owned real estate in joint tenancy with someone, an affidavit on death of joint tenant will need to be filed with the county where the property is located. The deed for the property will need to be located for this to be done. This is best left to an attorney.
15. **Antiques:** Have any antique pieces appraised. There are estate appraisers in the phone book who are often willing to come out and look at the property. Even items you may believe do not have any value could be worth hundreds of dollars.
16. **Decedents Business:** If the decedent owned a business and it was not incorporated, a court order may be necessary to continue operations.
17. **How the estate will pass:** Did decedent has a Will or Trust but not Estate planning documents? Was the decedent married at the time of death?
18. **Notice to Director of Health Services:** If the decedent was receiving public assistance at time of death, [MediCal], the Director of Health Services must be notified in writing.
19. **Notice to Beneficiaries:** Beneficiaries of an estate must receive formal, written notice.
20. **Creditors:** Determine who creditors are. Receiving the decedent's mail will be helpful here. All creditors must be notified.
21. **IRS:** A final tax return known as FORM 1041 will need to be filed. If there are estate taxes due, a FORM 706 will have to be filed. You will need to have an accountant or attorney experienced in filing this form. It is very complex and subject to audits.

***This list is by no means exhaustive. It is merely a starting point. It does not constitute legal advice and should not be construed as such. Every estate is different and an attorney familiar with the estate administration process should be retained to assist you.